

Owner Scope-Lock Worksheet

Southern Cities Construction - Free Resource

Use this worksheet before construction starts so scope, allowances, open items, and decision timing are clearer.

Project basics

- Property address
- Owner name and primary contact
- Target start date and target completion date
- Project type

1. What is actually being done?

- List every room, area, or exterior zone included.
- List anything the owner assumes is included but has not been clearly written anywhere.
- List anything intentionally excluded.

2. Allowances and selections

- Document allowance amount, who selects, and deadline for each major finish or fixture category.
- Examples: flooring, tile, cabinets, countertops, plumbing fixtures, lighting, appliances, paint level.

3. Open items that create change orders later

- Structural questions still not answered.
- Hidden condition risks.
- Permit questions still unresolved.
- Material lead-time risks or finish selections still undecided.

4. Decision deadlines and change-order rules

- Define final scope-lock date, permit submission date, selection deadlines, and contractor award deadlines.
- Clarify what counts as a change, who approves it, and how timeline impact is communicated.

If you need help pressure-testing scope, budget, or project setup, use the relevant services at southerncitiesconstruction.com.